



## Jason E. Marx

Partner

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### Overview

Jason E. Marx is a Partner of Mandelbaum Barrett PC practicing in the Tax, Trusts and Estates practice groups. He serves his clients in the areas of tax and estate planning, elder law, life care planning, asset and wealth preservation planning, and special needs planning.

Jason's taxation and estate planning practice focuses on estate planning, estate administration, wills and trusts, tax and business planning for individuals, corporations, partnerships and limited liability companies, and tax controversies. Jason serves as a strategic advisor to individuals, families, business owners, executors and trustees, counseling clients on a comprehensive range of issues within the areas of tax, trust and estate law. He designs and implements wealth preservation strategies and prepares a variety of estate planning documents such as wills, living wills, powers of attorney, trust agreements and special needs trusts. Jason counsels executors and trustees on the practical and successful administration of estates and trusts, including the minimization of income and estate tax liability and oversees the will probate process. He assists clients with the formation of corporations, limited liability companies and other business entities, the preparation of buy-sell agreements, the orderly transfer of business interests from one generation to another, the structuring of real estate transactions and the preparation of federal and state estate and inheritance tax returns. He represents clients in tax controversy matters before the Internal Revenue Service and the New Jersey Department of Taxation.

As an elder care and special needs attorney, Jason is committed to protecting and advocating for the legal rights of the elderly and the disabled to ensure that the unique needs of these individuals and their families are met. Through his holistic approach, Jason guides clients through the challenges associated with aging in place, planning for nursing home or other long-term care needs, guardianship issues, and the facilitation of a client's eligibility for Medicaid and related government programs and benefits.

In addition to his practice, Jason lectures extensively on elder care, estate planning, asset protection, special needs planning and related matters.

Jason is a member of the National Academy of Elder Law Attorneys. He is also a member of the Board of Trustees and treasurer of the New Jersey Chapter of the National Academy of Elder Law Attorneys, and he serves as a member of the Board of Trustees and Chair of the legal committee of the Jewish Community Housing Corporation.

### Publications

Marx, Jason. "[Estate Planning Challenges for Same-Sex Couples.](#)" Issues and Ideas with Chris DeBello. 106.3 WHCY-FM, 25 June 2023.

## Areas of Practice

[Elder Law](#)

[Special Needs](#)

[Tax Law](#)

[Trusts and Estates](#)

[Corporate](#)

## Admission

New Jersey

New York

Federal District of New Jersey

## Education

New York University School of Law, LLM, *Taxation*, 2003

Seton Hall University School of Law, J.D., *Concentration in Taxation and Health Law*, 1998

Boston University, BSBA, Finance, 1990 (*Zeta Beta Tau Fraternity, Golden Key National Honor Society*)

## Speaking Engagements

Hot Topics in Elder Law Speaker Series: "*Myths and Misconceptions in Estate and Medicaid Planning*," March 8, 2023.

Hot Topics in Elder Law Speaker Series: "*Legacies Instead of Litigation – Tips to Stay Out of Court for the Aging Population*," April 18, 2023.